



Presents

Contacts to Connections: Strategies for Growing Relationships that Drive Success

March 4, 2025
1:00 pm - 2:00 pm

Presenter: Ivy Slater
Moderator: Victoria Serigano, Esq.

Bio – Ivy Slater

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Your Catalyst to Lead, Build, and Scale



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Ivy Slater is the CEO of Slater Success, a boutique consulting, and coaching company focused on sustainable growth and leadership development for high-level, service-based businesses. Ivy is a professionally certified business coach, speaker, internationally bestselling author, and podcast host. Prior to Slater Success, she spent 20 years as owner and operator of Slater Graphics, a printing company in NYC, scaling it to multiple 7-figures.

She is the author of two books, *From the Barre to the Boardroom: Choreographing Business Success Through Authentic Relationships* Her and *Conquering Your Fear of Money, A Woman's Guide to Business Success*. Her third book, which focuses on being your best leader is due out early this year. She hosts a weekly podcast, *Her Success Story*, interviewing gutsy and dynamic leaders.

Ivy is a nationwide speaker, including a TEDx talk, has appeared in the media on ABC, CBS and is often quoted and is a source for publications including *Ladders*, *Authority Magazine* and *Real Simple*. Ivy has also received the Power Women Award presented by Schneps Media.



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Victoria R. Serigano is a senior associate at Reed Smith LLP. She is an experienced litigator representing clients in a range of business, commercial, and real estate matters, including contract disputes, commercial mortgage foreclosures, quiet title actions, and claims arising from joint ventures. Victoria is a member of the firm's Financial Industry Group and a committee member of the Women's Initiative Network at Reed Smith for its New York office.

She currently serves as Chair of the Professional Ethics, Discipline, and Practice Committee for the Women's Bar Association of the State of New York, and serves as Recording Secretary on the Brooklyn Women's Bar Association's Board of Directors, a chapter of the Women's Bar Association of The State of New York. These organizations are dedicated to achieving equality, diversity, fairness and opportunity for women lawyers and all women. As a member of the Women Trial Lawyer's Caucus, Victoria also served as a panelist on the Independent Judicial Screening Panel for the Supreme Court, County of New York, where she reported on the qualification of judicial candidates seeking the nomination of the Democratic Party for the November 2024 general election.

Victoria is admitted to practice in the State of New York as well as the United States District Courts for the Southern and Eastern Districts.

MATERIALS for CONTACTS TO CONNECTIONS

Worksheets:

1. New York State Unified Court System – Rules of Professional Conduct

- Rule 1.1 Competence
- Rule 8.4 (c)(e) and (h) Misconduct

2. Relationship Inventory Worksheet

Instructions: List individuals in your network in the categories below.

- **Professional Connections:** (e.g., colleagues, clients, mentors)
- **Personal Connections:** (e.g., family, friends, community contacts)
- **Potential Connections:** (e.g., people you'd like to meet or work with)

3. Networking Goal Setting Worksheet

Questions to Guide Your Goals:

1. What do you want to achieve through networking (e.g., gain clients, find a mentor)?
2. How many new connections will you aim to make in the next 3 months?
3. How often will you follow up with current connections?

4. Staying Connected Checklist

Calendar Weekly/Monthly Actions:

- Follow up with 2-3 contacts.
- Share an article, resource, or update with your network.
- Write personalized thank-you notes or emails.
- Review and update your CRM system.

Blogs:

Strategic Planning

<https://slatersuccess.com/blog-posts/2024/10/28/strategic-planning-season>

Leadership

<https://slatersuccess.com/blog-posts/2024/11/18/reinventing-leadership-confidence-and-adaptability-in-todays-marketplace>

rest, negotiation, arbitration, mediation or any other representation involving a specific party or parties.

- (m) "Partner" denotes a member of a partnership, a shareholder in a law firm organized as a professional legal corporation or a member of an association authorized to practice law.
- (n) "Person" includes an individual, a corporation, an association, a trust, a partnership, and any other organization or entity.
- (o) "Professional legal corporation" means a corporation, or an association treated as a corporation, authorized by law to practice law for profit.
- (p) "Qualified legal assistance organization" means an office or organization of one of the four types listed in Rule 7.2(b)(1)-(4) that meets all of the requirements thereof.
- (q) "Reasonable" or "reasonably," when used in relation to conduct by a lawyer, denotes the conduct of a reasonably prudent and competent lawyer. When used in the context of conflict of interest determinations, "reasonable lawyer" denotes a lawyer acting from the perspective of a reasonably prudent and competent lawyer who is personally disinterested in commencing or continuing the representation.
- (r) "Reasonable belief" or "reasonably believes," when used in reference to a lawyer, denotes that the lawyer believes the matter in question and that the circumstances are such that the belief is reasonable.
- (s) "Reasonably should know," when used in reference to a lawyer, denotes that a lawyer of reasonable prudence and competence would ascertain the matter in question.
- (t) "Screened" or "screening" denotes the isolation of a lawyer from any participation in a matter through the timely imposition of procedures within a firm that are reasonably adequate under the circumstances to protect information that the isolated lawyer or the firm is obligated to protect under these Rules or other law.
- (u) "Sexual relations" denotes sexual intercourse or the

touching of an intimate part of the lawyer or another person for the purpose of sexual arousal, sexual gratification or sexual abuse.

- (v) "State" includes the District of Columbia, Puerto Rico, and other federal territories and possessions.
- (w) "Tribunal" denotes a court, an arbitrator in an arbitration proceeding or a legislative body, administrative agency or other body acting in an adjudicative capacity. A legislative body, administrative agency or other body acts in an adjudicative capacity when a neutral official, after the presentation of evidence or legal argument by a party or parties, will render a legal judgment directly affecting a party's interests in a particular matter.
- (x) "Writing" or "written" denotes a tangible or electronic record of a communication or representation, including handwriting, typewriting, printing, photocopying, photography, audio or video recording and email. A "signed" writing includes an electronic sound, symbol or process attached to or logically associated with a writing and executed or adopted by a person with the intent to sign the writing.

RULE 1.1:

COMPETENCE

- (a) A lawyer should provide competent representation to a client. Competent representation requires the legal knowledge, skill, thoroughness and preparation reasonably necessary for the representation.
- (b) A lawyer shall not handle a legal matter that the lawyer knows or should know that the lawyer is not competent to handle, without associating with a lawyer who is competent to handle it.
- (c) lawyer shall not intentionally:
 - (1) fail to seek the objectives of the client through reasonably available means permitted by law and these Rules; or
 - (2) prejudice or damage the client during the course of the representation except as permitted or required by these Rules.

or

- (2) information gained by a lawyer or judge while participating in a bona fide lawyer assistance program.

RULE 8.4:

MISCONDUCT

A lawyer or law firm shall not:

- (a) violate or attempt to violate the Rules of Professional Conduct, knowingly assist or induce another to do so, or do so through the acts of another;
- (b) engage in illegal conduct that adversely reflects on the lawyer's honesty, trustworthiness or fitness as a lawyer;
- (c) engage in conduct involving dishonesty, fraud, deceit or misrepresentation;
- (d) engage in conduct that is prejudicial to the administration of justice;
- (e) state or imply an ability:
 - (1) to influence improperly or upon irrelevant grounds any tribunal, legislative body or public official; or
 - (2) to achieve results using means that violate these Rules or other law;
- (f) knowingly assist a judge or judicial officer in conduct that is a violation of applicable rules of judicial conduct or other law;
- (g) unlawfully discriminate in the practice of law, including in hiring, promoting or otherwise determining conditions of employment on the basis of age, race, creed, color, national origin, sex, disability, marital status or sexual orientation. Where there is a tribunal with jurisdiction to hear a complaint, if timely brought, other than a Departmental Disciplinary Committee, a complaint based on unlawful discrimination shall be brought before such tribunal in the first instance. A certified copy of a determination by such a tribunal, which has become final and enforceable and as to which the

right to judicial or appellate review has been exhausted, finding that the lawyer has engaged in an unlawful discriminatory practice shall constitute prima facie evidence of professional misconduct in a disciplinary proceeding; or

- (h) engage in any other conduct that adversely reflects on the lawyer's fitness as a lawyer.

RULE 8.5:

DISCIPLINARY AUTHORITY AND CHOICE OF LAW

- (a) A lawyer admitted to practice in this state is subject to the disciplinary authority of this state, regardless of where the lawyer's conduct occurs. A lawyer may be subject to the disciplinary authority of both this state and another jurisdiction where the lawyer is admitted for the same conduct.
- (b) In any exercise of the disciplinary authority of this state, the rules of professional conduct to be applied shall be as follows:
 - (1) For conduct in connection with a proceeding in a court before which a lawyer has been admitted to practice (either generally or for purposes of that proceeding), the rules to be applied shall be the rules of the jurisdiction in which the court sits, unless the rules of the court provide otherwise; and
 - (2) For any other conduct:
 - (i) If the lawyer is licensed to practice only in this state, the rules to be applied shall be the rules of this state, and
 - (ii) If the lawyer is licensed to practice in this state and another jurisdiction, the rules to be applied shall be the rules of the admitting jurisdiction in which the lawyer principally practices; provided, however, that if particular conduct clearly has its predominant effect in another jurisdiction in which the lawyer is licensed to practice, the rules of that jurisdiction shall be applied to that conduct.

STRATEGIC PLANNING SEASON



Welcome to November, or, as I like to call this time of year, the strategic planning season. Strategic plans can start as early as September or October and should be in full swing during November. Please try to complete them by December so you can go into 2025 with a fully realized Strategic Plan, Tactical Plan, and Team Plan.

First and foremost, think strategically for the long term: take a moment to think about your vision. What do you want your business to look like in 3 years, 5 years, or 10 years? Let's put a year on it and consider what you want to celebrate in 2030 for your business. What will you have accomplished? When you focus on the future like this, you'll think about the steps you must take in 2025 to build toward that vision.

I always suggest starting the process by blocking the time needed to develop your strategic plan. Think about bringing together a group of the right people from inside and outside your team for input to help facilitate the process and purposefully plan it.

Strategic Planning

Work from a sense of positivity: from a place of implementing improvement through what is possible. I have firmly believed for a long time that much more is accomplished when you show up with a "What Can I Do" attitude.

Reflect on what has happened in your business during 2024. What's working? What hasn't been working? Keep it positive – how can we take what is working and move it into

other business areas? It's counterproductive to come from a place of self-criticism and getting down on ourselves. Be open to embracing what you can learn and grow from here.

Now, break it down more granularly. Start with "What is Working?" What is working in your finances? What is working productivity-wise? What is working in your team? How about marketing and sales? (Remember that marketing and sales are two sides of the same coin! When they both work well, you see success.)

Take these thoughts and ideas and ask, "How can I expand to achieve the maximum in other areas that will help scale and grow our company? Break down the areas that require support, such as your financial plan, marketing, and sales. Don't forget to assess the consistency of your brand image and evaluate your sales performance.

Once you have your strategic plan in place, think about how you will implement it. Create a tactical plan to achieve your goals for 2025. In your tactical plan, look at the people or departments needed to execute these areas for your most significant long-term growth, and make sure they are on board and understand what is expected of them.

What actionable steps support the strategy and are necessary for success?

How are you going to hold the organization practically accountable?

The Team Plan

Teams can specify objectives that need to be reached and then create the actions that put these objectives in sequence. This process allows key team members, such as department heads, to accomplish what needs to be done one step at a time, fostering a productive work environment. Importantly, individual goals are aligned with the goals of the organization.

Some helpful thoughts on how to get started with your team plan:

What is planned for team growth?

What is working on your team? What's not?

Who are you developing? Who are you not developing?

What's your motivation for developing the individuals earmarked for growth?

Taking the time now to plan your 2025 goals and strategies will pay off handsomely.

You'll have given your vision a manuscript, thought through each critical dimension needing action plans, and sought feedback and consensus from your key players. Enjoy putting your 2025 strategic plan into effect!

REINVENTING LEADERSHIP -CONFIDENCE AND ADAPTABILITY IN TODAY'S MARKETPLACE



I recently had the pleasure of revisiting my friends at the Institute for Supply Management (ISM) to speak about a topic close to my heart: **Reinventing Leadership**. It was gratifying to drill down and share insights on two essential qualities in our ever-evolving professional landscape: embracing confidence and adaptability.

Reinvention and Leadership

Effective leadership in today's business marketplace involves more than keeping up with industry trends. It requires reinventing one's leadership style and inspiring others to do the same. Embracing new technologies and fostering a culture of continuous learning and flexibility are just a few ways to make this journey smoother and more enjoyable.

There's no better way to illustrate the power of reinvention than for me to describe my own journey.

-Getting Started-

I had my midlife crisis at 45. I was running a successful printing company that generated seven figures in revenue, but it wasn't enough. I wanted something more personally fulfilling, so I focused my reinvention on the new and growing field of professional coaching.

When I Googled business coaching back in 2007, I quickly learned that few people understood, let alone knew about, this career. It didn't appear on the first or second page of Google. I found it on page three after coaching soccer, tennis, and even fencing.

According to the 2023 ICF Global Coaching Study, it is now a \$4.56 billion industry.

I quickly learned my own inner confidence was an issue. I had no problem selling a printing job worth over \$30,000, yet I could barely sell coaching or consulting services at \$300 to \$500 per month per client. How did I transform? How do we transform and lead others to adapt and embrace change?

-Reinvention is Scary-

Reinvention is defined as something that has changed so much that it appears entirely new. Reinvention can be scary and intimidating, often seen as better suited for others than ourselves. It can feel like a rollercoaster ride: you're strapped in tightly, turned upside down, and left dangling. Even worse, it could be like being inside Space Mountain®, where you're in total darkness and can't see what's coming your way.

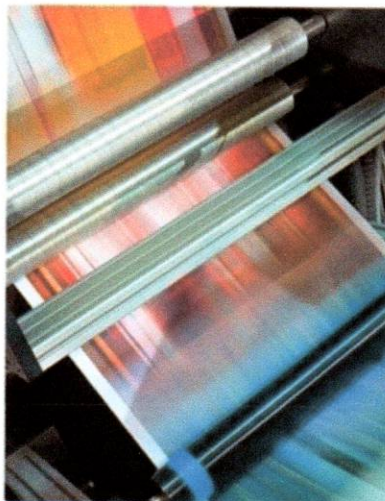
- Adaptability as a Core Strength -

In our world of constant change, pivoting quickly is essential. Leaders who **embrace flexibility** in their strategies can respond more effectively to evolving circumstances, keeping their organizations competitive and innovative.

I learned to **cultivate resilience**. Resilient leaders understand that challenges are part of the journey and view setbacks as opportunities for growth rather than threats. They instill this mindset in their teams, helping everyone bounce back stronger.

I also learned to **anticipate and welcome change**. Growth will always follow when you find a way to step outside your comfort zone.

Dancer, Printer, Slater Success



-Be The Change-

A principle of reinvention is to embrace the future. With the changes in business today, we need to reinvent ourselves and plan how to work as teams and leaders to stay ahead of the curve. One area that is shifting and evolving is Artificial Intelligence (AI), which has come to be viewed as a catalyst for productivity in a startlingly short time.

However, some individuals are resistant and fearful of AI. Others are leaning into it and learning how to use it as an asset for their productivity.

Leaders must take the initiative and be among the first to want to learn about new systems, technologies, and ideas to stay on the cutting edge in growth and innovation. We recently played with AI as we were brainstorming title ideas for a presentation and putting a short paragraph description together for it. It definitely shortened the time it has taken in the past.

Additionally, I've learned to use ChatGPT and AI to push myself out of my comfort zone. Instead of relying solely on what I've written many times before, I now use AI and take the time to explore other perspectives on the specific topic. Can I be more effective by describing it differently? The key is always starting with my thoughts as input rather than depending entirely on AI to create the project. This way, these advanced intelligence models are appropriately used as tools rather than alternative "authors."

I'll close with these summary points:

- Embrace Change: Growth comes from stepping outside your comfort zone.
- Lead with Confidence: Trust in your ability to navigate new challenges.
- Stay Curious: Keep learning, ask questions, and stay open to new perspectives.



WORKSHEET 1

THE CONNECTION CHALLENGE

GOAL:

COMMUNITY MEMBERS

FORMER CLASSMATES AND ALUMNI GROUPS

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WORKSHEET 1

THE CONNECTION CHALLENGE**GOAL:*****CURRENT COLLEAGUES
AND CLIENTS******FORMER COLLEAGUES
AND CLIENTS***

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WORKSHEET 1

THE CONNECTION CHALLENGE**GOAL:****CHARITIES AND NONPROFITS****NETWORKING GROUPS**

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WORKSHEET 1

THE CONNECTION CHALLENGE

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Set Your Goals for Networking Success

- ➔ **S** - Specific
- ➔ **M** - Measurable
- ➔ **A** - Achievable (Action Plan)
- ➔ **R** - Realistic
- ➔ **T** - Time-Frame

Where will you be networking?

How often are the meetings?

- Go to your calendar and put in the meetings scheduled for the next several months and check in monthly to see what is added and add it to your calendar.
- Block out time in your calendar to do 1:1 meetings.
- Keep notes in a CRM and mark personal as well as business info. The Money is in the follow up.
- Schedule actions to stay connected. ie: if you know they have a trip coming up mark your calendar to check in with them and see how the trip was.
- If you know they like to garden make a note in your calendar to see how their planting is going in early May/June.

March 2025

MON	TUE	WED	THU	FRI	SAT	SUN
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24	25	26	27	28	29	30
31						

My notes